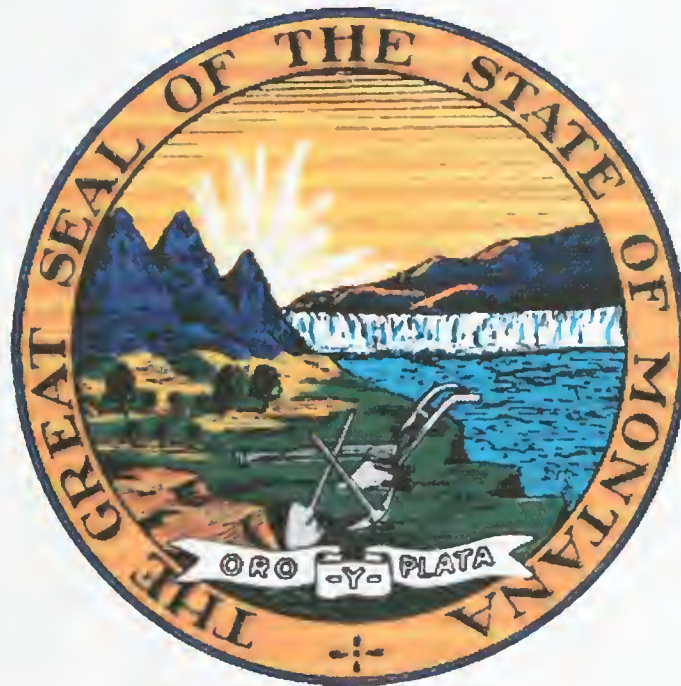


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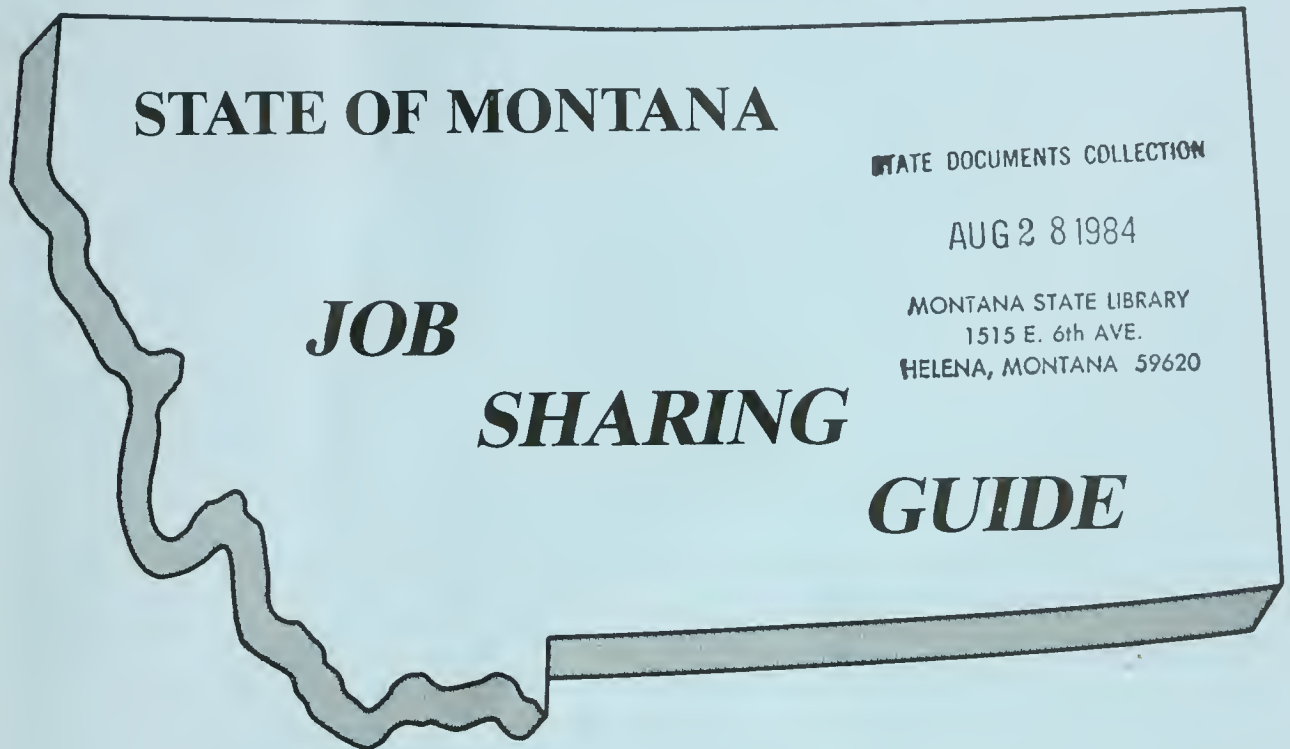
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JOB SHARING GUIDE

APRIL 16, 1984

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THIS IMPLEMENTATION GUIDE IS DESIGNED TO PROVIDE ASSISTANCE TO STATE SUPERVISORS, MANAGERS AND EMPLOYEES IN ADMINISTERING JOB SHARING ARRANGEMENTS. THIS GUIDE IS NOT STATE POLICY OR ADMINISTRATIVE RULE. IT IS NOT BINDING ON ANY AGENCY AND IT IN NO WAY ESTABLISHES PRACTICE OR SETS PRECEDENT.

AUTHORITY IMPLEMENTED

This guide provides assistance in implementing 2-18-107, MCA, which provides for job sharing. Citations of specific policies and rules to be used to administer salary and benefits are found in the sections covering these areas.

INTRODUCTION

In 1983, the Montana Legislature approved a bill formally establishing job sharing as an employment option for state agencies and employees.

Job sharing means the sharing by two or more persons of a position that is considered a permanent or aggregate position. The Legislature intends that job sharing be used by agencies as a means to promote increased productivity and employment opportunities.

The source of increased productivity in job sharing is principally the reduced labor cost that comes from the superior job performance of part-time employees. Compared with full-time employees, their productivity is often higher, their absenteeism and tardiness lower, and their turnover is also lower.

Early results of studies of job sharing show that:

- (1) job-sharing partners usually combine diverse skills that are complementary; and
- (2) the main problems with job sharing are ensuring that job sharers have compatible personalities, that the two partners' salaries are equitable, and that there is accountability for work quality between the two job sharers.

This guide is intended to provide agencies and employees with tools to evaluate whether specific positions and employees are appropriate for job sharing. Methods are suggested for handling day-to-day work assignments, for administering performance appraisal and for work planning. Each agency is responsible for establishing job sharing arrangements and administering and evaluating their success. The relationship of current law and rules on salary and benefits to job sharing arrangements also is explained in this guide.

EVALUATING POSITIONS FOR JOB SHARING

A proposal for job sharing commonly is developed in two ways. Where a supervisor believes a position may be appropriate to job share, the supervisor may develop the proposal. The supervisor should evaluate the position to determine if it is appropriate for a job share. Sometimes, current employees want to share a position. In this case, it would be appropriate to have the interested employees evaluate their personal situation, determine if job sharing is appropriate for them, and develop the proposal, subject to revision and approval by management.

An accurate position description is the foundation for the evaluation of a specific position for job sharing. While some studies indicate that any position has the potential to be shared, some types of jobs lend themselves more easily to this type of arrangement.

Some questions you may consider when looking at a specific position include:

- Does it require a broad range of skills?
- Can duties and responsibilities be clearly defined and divided?
- Does this position entail unusual amounts of stress?
- Does this position encompass regular peaks of activity and periods of non-activity?
- Are the job responsibilities reasonably autonomous?
- Are the job responsibilities unusually tedious or monotonous?
- Would the position benefit from coverage during unusual working hours?

Where you can answer yes to some or all of these questions, the position may be a good candidate for job sharing. The employee who currently is in the position or a comparable position also is a good source of information on whether it appears job sharing may be successful.

A position description for a position which currently is being successfully shared follows. The working title of this position is Policy Development Coordinator.

| | | | | | | |
|---|---|---|-------------------------------|-----------------------|----------------------------|----------------------|
| STATE OF MONTANA DEPARTMENT OF ADMINISTRATION PERSONNEL DIVISION | | POSITION DESCRIPTION | | Personnel Use Only | (PIQ and PD combined 7/79) | |
| <p>The Position Description should provide a detailed statement of the duties and responsibilities assigned to an employee. As the building block of an effective personnel administration program, the Position Description must be completed to assist in classification, pay, recruitment, selection, performance evaluation, training, staffing analysis and other management functions. Thus, in order for this form to be effective, adequate time and effort must be expended in following its instructions, in understanding its intent and in completing it.</p> <p>Each agency may decide who should complete the form. Considerations that affect this choice are the circumstances for completing it, the desire to stimulate employee participation and interest, and the authority and responsibility of management to determine the duties and responsibilities of positions. The form does require that management complete the sections concerning physical demands, supervision received and requirements. Signature blocks have been provided to allow larger agencies several levels of review and approval. Each agency should establish its own policy and procedure regarding the review and approval of the form.</p> <p>Before proceeding, PLEASE READ THE ENTIRE FORM to understand how sections relate to each other and to avoid repeating information. If there are any questions about completing this form, contact your agency personnel officer or the State Personnel Division at 449-3871.</p> <p style="text-align: center;">PLEASE TYPE OR PRINT CLEARLY</p> | | | | | | |
| 1 | Classification | Current: | Title Personnel Specialist | Class Code 166058 | Grade 13 | Position No. 6202 |
| | | Proposed | Personnel Specialist III | 166055 | 14 | |
| 2 | Agency | Department, Agency or University Unit | | | Division or equivalent | |
| | | Administration | | | Personnel | |
| 3 | Address | City | | Building & Street | Room Number | Business Telephone |
| | | Helena | | Mitchell Bldg. | 130 | |
| 4 | Prepared by: | <input type="checkbox"/> Employee <input type="checkbox"/> Supervisor/Management | | | | |
| Name of Employee: _____ | | | | | | |
| 5 | Describe the activity, function, product or service of the office or work unit in which the position is situated: Responsible for state personnel rule development and revision, including researching, drafting, revising policies, analyzing and incorporating comments received and preparing policies for adoption as administrative rules; develops and presents workshops; prepares monthly personnel newsletter; sets agenda and serves as chairman for Personnel Policy Network; supervises 1 staff position; provides technical assistance to agencies. | | | | | |
| 6 | DUTIES AND RESPONSIBILITIES OF POSITION: | | | | | |
| Describe the duties, tasks and responsibilities of the position. Begin with a general statement of what the position does and then organize the description into duties and tasks beginning with the most important duties. A duty is a large segment or category of work performed and can be used to group related tasks. Task statements are effectively written by using the following format: an <u>action verb</u> , an <u>object</u> , an <u>output</u> and <u>how accomplished</u> . Use language that will enable a person not familiar with the work of the position to understand what is taking place in the work activities described. Avoid words that are not graphic, such as "assists", "develops", "handles", "processes" and "works with". Complete this section by estimating the percent of time spent on each duty. | | | | | | |
| Development and revision of state personnel rules. | | | | | | |
| 1. Researches the literature, law, and regulations covering proposed rule development or revision to assemble an overview of possible options for rule content using knowledge of library services, other available sources of technical literature, state and federal law, rules and regulations. | | | | | | |
| 2. Drafts content of new personnel rules and revises content of existing rules to initiate review and comment using knowledge research material, technical writing style, rule format requirements of Secretary of State and related rules and laws. | | | | | | |
| 3. Requests comments and recommendations for revision on proposed rule activity from internal policy staff, task forces, personnel network, agency heads and legal staff to receive ideas from those affected by rules using correspondence and meetings. | | | | | | |
| 4. Revises initial rule drafts to write a draft ready to submit to Secretary of State for notice of rule action, using appropriate comments from interested persons and continuing internal review of earlier drafts. | | | | | | |

PART I: TO BE COMPLETED BY EMPLOYEE OR SUPERVISOR / MANAGEMENT

Duties and Responsibilities (continued)

%

Monthly Personnel Newsletter.

1. Assembles list of story ideas by maintaining list of stories from previous issues which require follow-up and by contacting division administrator for ideas.
2. Writes memo to staff member who will write story giving him or her topic, content recommendations, other pertinent information and the deadline using story list and newsletter style and time line guidelines.
3. Edits stories to make style consistent throughout draft which is submitted to bureau chief and division administrator for review and approval to publish using newsletter style guidelines.

Technical Assistance.

1. Answers questions from agencies to provide policy interpretations using MOM, Administrative Rules, law, policy interpretation manual, and other guides and resources by using telephone or composing memos.
2. Compares agency policies to state rules to comply with requirements of adoption of Personnel Policy Rules by using specific state policy, interpretations and by writing a memo to the agency either finding the agency policy is acceptable or pointing out conflict with state rule and suggesting specific alternatives.

Personnel Network.

1. Assembles an agenda for Personnel Policy Network meetings using suggestions from division staff and agency representatives.
 2. Serves as chairman for the Personnel Network meeting by making presentations, summarizing discussion and stating a consensus where one is reached, using meetings and platform skills, knowledge of specific topics to be discussed.
- Supervision. Supervises one professional staff position to assign and review work using daily contact, performance appraisal and work plans.

(Attach additional sheets if necessary)

7 SUPERVISION EXERCISED: List the position number and title of positions directly supervised

| Position No. | Title | Position No. | Title |
|--------------|----------------------------------|--------------|-------|
| | Personnel Specialist II-Directly | | |
| | Administrative Aide I-Indirectly | | |
| | | | |
| | | | |
| | | | |

Describe the nature of supervision exercised in the following areas: setting policies, objectives, work plans, work methods and priorities; assign, review, evaluate, train, hire, discipline

8 EQUIPMENT OR MACHINERY USED: Indicate the percent of total work time.

| Type | % | Type | % |
|------------|---|------|---|
| Typewriter | | | |
| Calculator | | | |
| Dictaphone | | | |
| | | | |
| | | | |

9

PERSONAL CONTACTS

Describe the types, reasons for and frequency of personal contacts necessary to perform the work of this position by using the following as a guide:

| WHO | | WHY | | FREQUENCY |
|--------------|------------------|------------------------|-----------------------|-----------|
| clerical | clientele | to provide information | to gather information | daily |
| professional | general public | to make arrangements | to elicit cooperation | weekly |
| management | private business | to negotiate | to advise | monthly |
| | etc. | to persuade | etc. | yearly |

Indicate whether contacts are within work unit, within agency or external.

Clerical Staff - once or twice a day - assignments.
 Professional Staff - once or twice a day - instructions, review.
 Management Staff - several times a week - instructions, review.
 Legislators - several times a year - explanations of policy.
 Private Sector Professional Staff - several times a year - explanations of policy.
 Private Sector Managers - several times a year - explanations of policy.
 General Public - several times a year - explanations of policy.
 Federal Grant - several times a month - review, explanations of policy.

10

DECISIONS AND COMMITMENTS: SCOPE AND EFFECT

Describe areas, kinds and impact of decisions and commitments; the effects, influence and significance of the work of the position; the consequence of error and subsequent accountability, and limitations on the extent and finality of actions and decisions.

Error in policy communication could create a legal liability for the State. Depending on the issue, could range from inconsequential to a significant monetary award to the affected party that was informed. Incumbent has program responsibility and makes policy decisions, subject to approval of supervisor; sets own priorities and schedules with broad parameters set by supervisor; independently provides advice and interpretations; seeks supervisor's approval on major or controversial questions; supervises positions following bureau work plans to establish work priorities.

11

To the best of my knowledge, the duties & responsibilities described herein are accurate & complete.

Employee
Signature: _____

Date: _____

12

IMMEDIATE SUPERVISOR:

Name: _____ Title: _____

13

ADDITIONAL COMMENTS OR INCORRECT ITEMS:

14

SUPERVISION RECEIVED

Describe how this position is supervised by using the following as a guide

1. How is work assigned, i.e., in what format, by whom, etc.? 2. How are work methods, procedures and priorities determined?
 3. What guidelines, manuals, procedures & references are available & how are they used? 4. What assistance is available from others, i.e., supervisor, coworkers, outside specialists, etc.? 5. How is work reviewed, i.e., by whom, how often, by task, by objective, what methods, etc.?

1. Incumbent sets own priorities and schedules within broad parameters set by supervisor;
 2. Establishes own work methods and procedures;
 3. Uses broad variety of references, other policies in research;
 4. Solicits opinions and comments from a variety of sources;
 5. Work is reviewed by bureau chief, administrator, director, and agency personnel.
 Major policy provisions are subject to their approval.

15 KNOWLEDGES, SKILLS AND ABILITIES

Describe the knowledges, skills and abilities (KSA's) that are specifically job related, essential to perform the work of this position and are essential for appointment to this position. Do not include those things typically learned on the job.

Considerable knowledge of personnel management, ability to communicate effectively orally or in writing. Ability to deal effectively with the public.

Which of the above can be used to distinguish superior performance?

Excellent communication skills would be an asset.

16 EDUCATION AND EXPERIENCE

Describe specific kind, amount and level of education (curriculum, courses, specialization) and experience that indicate the source of KSA's and that can be used in selecting a person for this position.

College degree in Personnel Management, Public Administration, or related field.
Two years of professional experience in personnel administration or related field.

17 PHYSICAL DEMANDS AND WORKING CONDITIONS

Describe any physical demands, working conditions or job hazards that affect how the incumbent performs the job or that impose additional requirements in selecting a person for the position or that affect the complexity and nature of work.

N/A

18 To the best of my knowledge, the statements in Parts I and II are accurate and complete.

Supervisor's

Signature: _____ Date: _____

ADMINISTRATIVE REVIEW AND APPROVAL: Agency option except number 3

Comment:

☐ Additional comments attached

1. Signature: _____

Title: _____

Date: _____

Comment

☐ Additional comments attached

2. Signature: _____

Title: _____

Date: _____

Comment:

☐ Additional comments attached

3. Agency Director or Designee _____

Date: _____

Analyzing the Position

This analysis of the position for job sharing potential uses the preceding position description to evaluate positive aspects of sharing the work and potential problem areas.

(Note: The numbers indicate the numbers used in specific sections of the position description.)

6. Duties and Responsibilities of position: Duties require a wide range of knowledges, skills and abilities, including writing, researching, analyzing, interpreting, running effective meetings, public speaking, supervising, working with other technical staff, knowledge of rules, formats, publishing.

7. Supervision exercised: This may be a duty which cannot be divided between job partners, but should be assigned to one partner in trade-off for other duties. Sharing supervision could prove to be ineffective and confusing for the job share partners and especially for the employee being supervised. However, having a part-time supervisor over a full-time employee also can create problems.

8. Machinery used: Use of machinery listed is helpful, but not critical to effective work in the position. No special training would be needed.

9. Personal contacts: Position requires a fairly high degree of accessibility, because it handles numerous requests for technical assistance, both from other agencies and jurisdictions and from division staff. Scheduling needs to maximize accessibility of both partners, probably with time at work daily.

10. Decisions and commitments: scope and effect: Partners need to provide consistent and accurate advice and document that advice. On-going communication on project development critical to avoid unnecessary duplication of effort. Partners need not follow exactly the same work routine, but need compatible working habits.

14. Supervision received: Partners are responsible for establishing work methods and procedures and setting schedules, with approval of supervisor. Methods and procedures should minimize duplication of contact with supervisor on problems. Work methods also must be flexible enough to handle special requirements of management, such as special legislative session, unanticipated research or reports, etc.

Conclusion

An analysis of this position shows it would be appropriate to job share, because two persons would bring strength in a wider range of knowledges, skills, and abilities needed to perform the job. Possible problem areas include supervision exercised and supervision received. Assignment of supervision exercised to one partner should resolve that problem. Establishment of sound work methods and procedures and close, on-going communication between partners should reduce supervisory conflicts.

WORK PLANNING

A comprehensive work plan is an important element in the success of a job sharing arrangement. Without clearly defined goals, specific projects, and time frames, the partners in a job share may duplicate effort in some areas and overlook needed work in others.

This sample work plan for a policy development section concentrates on specific projects in the major program areas covered by the section and includes time frames for the projects. A discussion follows on the ways in which the work is divided or shared.

POLICY SECTION

Work Plan FY-84

I. Policy Development

(Goal: To have a complete revision of the MOM, Volume III by October 1, 1984, and begin enhancements to increase its usefulness as a supervisory tool.)

- A. Review and research all priority 1 and 2 policy areas with second drafts for distribution to network by June 1, 1984.
- B. Use task force approach (3 to 5 network members) in drafting policy changes.
- C. Develop comprehensive model policies in two major policy areas by December 31, 1983. Sexual Harassment, Alternative Work Schedules, Job Sharing.)
- D. Complete planning form by first week of month every other month.
- E. Begin development of guide material for inclusion in MOM, (model policies, checklists, forms, implementation guides). Complete guides on discipline and grievances by October 31, 1984.

II. Technical Assistance

- A. Include complete records of policy interpretation so staff can provide prompt consistent assistance to agencies.
- B. Keep network informed of policy revisions or interpretations.
- C. Encourage agencies to provide input on problem areas and needed policy revisions.
- D. Take steps to promote use of agency personnel officers.

III. Personnel Network

(Goal: improve the use of the Personnel Network as a general communication process between personnel practitioners.)

- A. Schedule and conduct network meetings.
- B. Inform members of topic for concerns of members portion of agenda at least one week prior to meeting date.

IV. Publications

- A. Prepare monthly newsletter for distribution by 20th of each month.

V. Training

- A. Provide training as scheduled on selected topics (discipline, personnel practices, personnel policies, etc.).
- B. Provide assistance with coordination and promotion of personnel training.

Sharing the Work

It is important to remember that the partners share responsibility for completion of the duties assigned to a position. However, the work itself frequently is divided in ways that best use the strengths of the individuals who share the job. In reviewing specific requirements of the policy section work plan, ways of dividing the work become clear.

- I. In the section on policy development, one duty is to review and research all top priority policies and have drafts prepared for review by June 1. To implement this duty, specific policies are divided between the partners, according to interest or expertise in specific policy areas. The individuals are leaders of specific policy task forces. Researching the specific policy areas is the responsibility of one partner. Actual drafting of policy is done by one person. The other partner reviews the drafts and comments and provides research material pertinent to the policy area which may be discovered while researching other policies.
- II. In the technical assistance area, the partners have prepared and continually update an interpretation guide on specific policy questions. Developed as a desk reference, the partners can turn to the guide for assistance in responding to policy questions in a consistent and accurate manner.
- III. In the area of the Personnel Network, the partners are prepared to report on specific areas of work. They trade off serving as chairperson for the meeting.
- IV. In the area of publications, the partners alternate serving as editor for the monthly newsletter.
- V. In the area of training, the partners specialize in training for specific policy areas.

As special projects evolve which are not anticipated in the work plan, management may assign the project to one of the partners or may assign the work to the team and allow them to divide specific tasks.

PERFORMANCE APPRAISAL

Thinking of job sharing as completion of the duties of one full-time position by more than one person helps differentiate job sharing from part-time work. In part-time work, there are not enough duties to fill a full day. In developing the position description and the work plan, the "one position-two person" approach is important.


But when it comes to evaluating actual performance on duties, you cannot realistically hold one partner responsible for the work of the other.

A single performance appraisal should be developed for the position which applies to each of the partners. The duties and the standards should be the same in most cases. Each partner should receive his or her own copy of the appraisal forms. If there are duties which are to be performed by one partner and not the other, that should be clear in the performance appraisal. For example, the duty of supervision exercised in the policy development coordinator position is assigned to only one of the partners. The other partner is not evaluated on this duty.

Development of the appraisal should involve the supervisor and both partners. It is always useful to involve the employee in development of performance duties and standards, but with job sharing, this joint effort paves the way for clear understanding on the part of all involved.

The supervisor should plan to meet individually with the partners when the actual performance rating is done, although it would be useful to also conduct a joint meeting to examine strategies for strengthening the overall work done in the position.

A performance appraisal for this position follows.

| | | | | | | | | | | | | | | | | |
|---|--|--|--|---|--|---|-------------|--|----------------|--|----------|--|-------------------|--|--------------|--|
|  STATE OF MONTANA | | <h1 style="margin:0;">EMPLOYEE PERFORMANCE APPRAISAL FORM</h1> | | | | Page <u>1</u> of <u>7</u> | | | | | | | | | | |
| Last Name First Name Middle Class Title | | Policy Coordinator | | | | APPRAISAL TYPE <input type="checkbox"/> Periodic <input type="checkbox"/> Probationary <input type="checkbox"/> Other | | | | | | | | | | |
| PERFORMANCE APPRAISAL PLAN | | Dates from <u>6/83</u> to <u>6/84</u> | | ACCOMPLISHMENTS | | | | | | | | | | | | |
| Duties/Responsibilities/Goals | | Performance Standards/Objectives | | Comments | | | | | | | | | | | | |
| A. Develop and revise State Personnel policies. | | <ol style="list-style-type: none"> 1. Planning form is completed at least quarterly including approved deadlines and completion dates. 2. Procedures are clearly outlined in manual within one month of establishing new procedures. 3. Policies are completed in accordance with planning form. 2nd draft 90% final rule 75% 4. Maintains complete documentation and files on policy development. 5. Initial drafts provide a good basis for revision and review, including research and outline of all major policy issues. 6. Policies draft are consistent with other policies, rules, and laws, accepted practice, criteria, adoption of policy rule. | | <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td>Outstanding</td> <td></td> </tr> <tr> <td>Above Standard</td> <td></td> </tr> <tr> <td>Standard</td> <td></td> </tr> <tr> <td>Needs Improvement</td> <td></td> </tr> <tr> <td>Unacceptable</td> <td></td> </tr> </table> | | | Outstanding | | Above Standard | | Standard | | Needs Improvement | | Unacceptable | |
| Outstanding | | | | | | | | | | | | | | | | |
| Above Standard | | | | | | | | | | | | | | | | |
| Standard | | | | | | | | | | | | | | | | |
| Needs Improvement | | | | | | | | | | | | | | | | |
| Unacceptable | | | | | | | | | | | | | | | | |
| EMPLOYEE | | DATE | | EMPLOYEE <input type="checkbox"/> comments attached DATE | | | | | | | | | | | | |
| SUPERVISOR | | DATE | | SUPERVISOR <input type="checkbox"/> comments attached DATE | | | | | | | | | | | | |
| SIGNATURES | | | | REVIEWER <input type="checkbox"/> comments attached DATE | | | | | | | | | | | | |

*I have reviewed this evaluation, have had an opportunity to discuss any questions with the appraiser and understand that I may submit a written rebuttal within 10 days.

| | | | | | | |
|---|--|---|--|--|---|---------------------------|
| | | <h1 style="margin: 0;">EMPLOYEE PERFORMANCE APPRAISAL FORM</h1> | | | | Page <u>2</u> of <u>7</u> |
| Last Name First Name Middle Class Title | | APPRAISAL TYPE <input type="checkbox"/> Periodic <input type="checkbox"/> Probationary <input type="checkbox"/> Other | | | | |
| Policy Coordinator | | | | | | |
| Dates from <u>6/83</u> to <u>6/84</u> | | | | | | |
| PERFORMANCE APPRAISAL PLAN | | ACCOMPLISHMENTS | | | | |
| Duties/Responsibilities/Goals | | Comments | | | | |
| <p>B. Provide technical assistance on policy interpretation and administration.</p> | | <div style="display: flex; justify-content: space-between;"> <div style="width: 15%;"> Outstanding Above Standard Standard Needs Improvement Unacceptable </div> <div style="width: 85%;"> <p>7. Policies are adopted in accordance with established procedures for public review and comment, including ARM.</p> <p>8. Complete all major revisions to existing policies and adopt unissued policies by October 1, 1984.</p> <p>9. Begin development of guide material (model policies, checklists, forms, implementation guides). Complete at least two major guides (discipline, job sharing) by October 31, 1984.</p> <p>1. Provides clear interpretation of policy provisions as needed - consistent with other policies, rules, legal rulings and precedent.</p> <p>2. Informs supervisor of issues requiring significant policy decisions.</p> </div> </div> | | | | |
| EMPLOYEE | | DATE | | | EMPLOYEE <input type="checkbox"/> comments attached DATE | |
| SUPERVISOR | | DATE | | | SUPERVISOR <input type="checkbox"/> comments attached DATE | |
| SIGNATURES | | REVIEWER <input type="checkbox"/> comments attached DATE | | | | |
| <p><i>*I have reviewed this evaluation, have had an opportunity to discuss any questions with the appraiser and understand that I may submit a written rebuttal within 10 days.</i></p> | | | | | | |

| | | | | | |
|---|------------|--|--|---|--|
| | | <h1 style="margin: 0;">EMPLOYEE PERFORMANCE APPRAISAL FORM</h1> | | Page <u>3</u> of <u>7</u> | |
| Last Name | First Name | Middle | Class Title Policy Coordinator | APPRAISAL TYPE <input type="checkbox"/> Periodic <input type="checkbox"/> Probationary <input type="checkbox"/> Other | |
| PERFORMANCE APPRAISAL PLAN | | Dates: from <u>6/83</u> to <u>6/84</u> | | | |
| Duties/Responsibilities/Goals | | Performance Standards/Objectives | | | |
| <p>C. Provides assistance in development of agency policies and reviews same for compliance with minimums. (Reviews policies when asked to.)</p> <p>D. Conduct network/task force meetings and public hearings.</p> | | <p>3. Responds to routine inquiries by next day.</p> <p>4. Requests requiring policy decision; research issued within 3 days of request.</p> <p>5. Set up an interpretation guide and begin documenting significant policy interpretations by June 30, 1984.</p> <p>1. Assistance is practical, tactful, and consistent with agency needs, state law and rules. Criticism includes recommended alternatives. (Responses do not cause valid complaints or require major redrafting in 9 out of 10 cases.)</p> <p>1. Meetings are scheduled as needed in order to provide adequate input on policy issues.</p> <p>2. Conduct of meetings allows adequate discussion and input.</p> | | | |
| EMPLOYEE | | DATE | | EMPLOYEE <input type="checkbox"/> comments attached DATE | |
| | | SUPERVISOR | | SUPERVISOR <input type="checkbox"/> comments attached DATE | |
| | | REVIEWER | | REVIEWER <input type="checkbox"/> comments attached DATE | |
| ACCOMPLISHMENTS Comments | | | | | |
| | | | | | |

SIGNATURES

*I have reviewed this evaluation, have had an opportunity to discuss any questions with the appraiser and understand that I may submit a written rebuttal within 10 days.

| EMPLOYEE PERFORMANCE APPRAISAL FORM | | | Page <u>4</u> of <u>7</u> | | | | | | | | | | |
|--|---|--|---------------------------|-------------|--|----------------|--|----------|--|-------------------|--|--------------|--|
| Last Name | First Name | Middle | Class Title | | | | | | | | | | |
| | | Policy Coordinator | | | | | | | | | | | |
| PERFORMANCE APPRAISAL PLAN | | Dates: from <u>6/83</u> to <u>6/84</u> | | | | | | | | | | | |
| Duties/Responsibilities/Goals | Performance Standards/Objectives | | | | | | | | | | | | |
| <p>E. Prepare Newsletter monthly.</p> | <p>3. Comments are incorporated into policies where appropriate.</p> <p>4. Important issues and comments are communicated to participants with adequate time for review prior to meetings or deadlines.</p> <p>1. Newsletter is distributed by the 20th of each month. (10 out of 12 months.)</p> <p>2. Includes major items - each Bureau has chance for input - content is verified.</p> <p>3. Major technical editing is completed before the review stage.</p> <p>4. Articles are clear and concise - only 1 or 2 minor errors in content, grammar, or spelling per issue.</p> <p>5. Provides news articles and news releases which meet accepted newsletter practices.</p> | | | | | | | | | | | | |
| | <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Outstanding</td> <td></td> </tr> <tr> <td>Above Standard</td> <td></td> </tr> <tr> <td>Standard</td> <td></td> </tr> <tr> <td>Needs Improvement</td> <td></td> </tr> <tr> <td>Unacceptable</td> <td></td> </tr> </table> | | | Outstanding | | Above Standard | | Standard | | Needs Improvement | | Unacceptable | |
| | Outstanding | | | | | | | | | | | | |
| | Above Standard | | | | | | | | | | | | |
| | Standard | | | | | | | | | | | | |
| Needs Improvement | | | | | | | | | | | | | |
| Unacceptable | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> <div> EMPLOYEE SUPERVISOR </div> <div> <input type="checkbox"/> Attached <input type="checkbox"/> Attached <input type="checkbox"/> Attached </div> <div> DATE DATE DATE </div> </div> | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> <div> EMPLOYEE SUPERVISOR </div> <div> <input type="checkbox"/> Attached <input type="checkbox"/> Attached <input type="checkbox"/> Attached </div> <div> DATE DATE DATE </div> </div> | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> <div> EMPLOYEE SUPERVISOR </div> <div> <input type="checkbox"/> Attached <input type="checkbox"/> Attached <input type="checkbox"/> Attached </div> <div> DATE DATE DATE </div> </div> | | | | | | | | | | | | | |

SIGNATURES

*I have reviewed this evaluation, have had an opportunity to discuss any questions with the appraiser and understand that I may submit a written rebuttal within 10 days.



STATE
OF
MONTANA

EMPLOYEE PERFORMANCE APPRAISAL FORM

Page 5 of 7

| | | | | | | |
|-----------|------------|--------|--------------------|--------------------------------|--------------------------|--------------------------|
| Last Name | First Name | Middle | Class Title | APPRaisal TYPE | Periodic | Probationary |
| | | | Policy Coordinator | <input type="checkbox"/> Other | <input type="checkbox"/> | <input type="checkbox"/> |

| PERFORMANCE APPRAISAL PLAN | | Dates from 6/83 to 6/84 |
|----------------------------------|---|-------------------------|
| Duties/Responsibilities/Goals | Performance Standards/Objectives | |
| F. General personnel assistance. | <ol style="list-style-type: none">1. Prepare research plan for study of performance appraisal implementation by July 1, 1983.2. Conduct interviews of supervisors on PAS implementation and provide specific recommendations for System improvement by April 1, 1984.3. Establish task force to study Employee Assistance Program by July 1, 1983.4. Identify steps which can be taken to assist managers with EAP by September 1, 1983.5. Research EAP's in business and government and develop a legislature proposal by April 1.6. Coordinates initial employee open forum meetings in accordance with plan.7. Revise employee handbook by July 1, 1983. | |

| ACCOMPLISHMENTS | | | | |
|-----------------|----------------|----------|-------------------|--------------|
| Outstanding | Above Standard | Standard | Needs Improvement | Unacceptable |
| | | | | |

| | | | | |
|------------|------|------------|--|------|
| EMPLOYEE | DATE | EMPLOYEE | <input type="checkbox"/> comments attached | DATE |
| SUPERVISOR | DATE | SUPERVISOR | <input type="checkbox"/> comments attached | DATE |
| SIGNATURES | | REVIEWER | <input type="checkbox"/> comments attached | DATE |

*I have reviewed this evaluation, have had an opportunity to discuss any questions with the appraiser and understand that I may submit a written rebuttal within 10 days.

| | | | | | |
|--|--|--|--------|---------------------------------------|--|
| STATE OF MONTANA | | EMPLOYEE PERFORMANCE APPRAISAL FORM | | Page 6 of 7 | |
| Last Name | | First Name | Middle | Class Title | |
| | | | | Policy Coordinator | |
| PERFORMANCE APPRAISAL PLAN | | Dates from 6/83 to 6/84 | | APPRaisal TYPE | |
| Duties/Responsibilities/Goals | | Performance Standards/Objectives | | <input type="checkbox"/> Other | |
| G. Program administration. | | 1. Recommends modifications or enhancements to procedures, objectives, or standards as needed. | | <input type="checkbox"/> Periodic | |
| H. Provides staff support to Bureau Chief. | | 2. Establishes long-term program goals for next biennium. | | <input type="checkbox"/> Probationary | |
| I. Supervises Personnel Specialist II and indirectly supervises Administrative Aide I. | | 1. Is responsive to special assignments from Bureau Chief within assigned objectives and time frames. | | | |
| | | 2. Bureau Chief is kept informed/involved in important or sensitive issues affecting Bureau operations, image, or morale. | | | |
| | | 1. Provides work plans and schedules to Personnel Specialist II and generally directs work plans of Administrative Aide I. | | | |
| | | 2. Reviews work plans and performance appraisal at least monthly with employee; updates and revises as needed. | | | |
| EMPLOYEE | | DATE | | EMPLOYEE | |
| SUPERVISOR | | DATE | | SUPERVISOR | |
| SIGNATURES | | DATE | | REVIEWER | |
| | | | | DATE | |
| | | | | DATE | |
| | | | | DATE | |

STATE OF MONTANA

EMPLOYEE PERFORMANCE APPRAISAL FORM

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Last Name

First Name

Middle

Class Title

APPRaisal TYPE

Other

Periodic

Probationary

PERFORMANCE APPRAISAL PLAN

Duties/Responsibilities/Goals

Performance Standards/Objectives

Dates from 6/83 to 6/84

3. Communicates new rules, procedures and other appropriate information to employees on a timely basis.

4. Monitors general conduct, i.e., absenteeism, tardiness, and takes prompt and appropriate disciplinary action when necessary. Consults on disciplinary actions for administrative aide, if needed.

ACCOMPLISHMENTS

Comments

EMPLOYEE

DATE

EMPLOYEE

DATE

SUPERVISOR

DATE

REVIEWER

DATE

SIGNATURES

I have reviewed this evaluation, have had an opportunity to discuss any questions with the appraiser and understand that I may submit a written rebuttal within 10 days.

EVALUATING EMPLOYEES FOR JOB SHARING

When two individuals share one full-time position, it does not mean an equal division of labor. Instead, it relies on using the specific talents of two individuals to accomplish the duties usually performed by a single employee.

The partners must develop compatible, consistent and cooperative work methods and procedures. They must develop effective ways to communicate with each other and with their supervisor, in order to maximize productivity and reduce duplication of effort.

The following worksheet addresses issues related to sharing work which employees, or potential employees, interested in job sharing should consider. Completing this worksheet should assist interested current or potential employees in deciding if job sharing is for them.

If the answer is yes, current employees should prepare a proposal for sharing a position as outlined in this guide. Supervisors should make copies of the worksheet available to current employees, before an actual proposal is prepared. It is designed to be for the employee's personal use and is not intended to become part of the proposal or the employee's personnel file. The checklist should also be made available to outside applicants for job share positions as part of the recruitment process.

WORK SHEET A

This work sheet is a guide to assessing how sharing a job will affect your life-style. It is for your personal use and will not become part of your personnel file.

I. CAN I AFFORD IT FINANCIALLY?

| | <u>Your monthly figures</u> | <u>Example A (monthly)</u> |
|--|-----------------------------|----------------------------|
| 1. My current monthly budget. | 1. \$ _____ | 1. \$ 600 |
| 2. The amount of money I need to spend to live. | 2. \$ _____ | 2. \$ 500 |
| 3. Additional identified income. | 3. \$ _____ | 3. \$ 100 |
| 4. What my take-home pay must be (#2 minus #3). | 4. \$ _____ | 4. \$ 400 |
| 5. The amount of time I want to work (1/2 time, 3/4 time). | 5. \$ _____ | 5. 1/2 time |
| 6. What the net full time salary would have to be for the job I want to share. | 6. \$ _____ + | 6. \$ 800 |
| 7. Plus taxes (FICA, Federal & State withholding, etc.). | 7. \$ _____ | 7. \$ 200 |
| 8. What the advertised salary would have to be of the job I want to share. | 8. \$ _____ | 8. \$1,000 |
| 9. Are the positions you are qualified to apply for in this salary range? | 9. _____ | |

II. CAN I AFFORD IT PROFESSIONALLY?

1. What do I want to be doing three years from now?

2. Do I need to obtain additional knowledges, skills and abilities in order to perform the duties of the position I want to share?

3. Will sharing a job allow me to reach my career goal?

III. CAN I ADJUST TO A SHARED ARRANGEMENT?

Make a list of all the jobs you have had and answer the following questions for each job.

1. Rate the job on a scale of 1 to 10, 1 signifying that the job required you to be very competitive and 10 that the job required you to be very cooperative.

2. Apply this same rating system for the general work environment of the job. In other words, was the atmosphere and/or the people around you primarily competitive or cooperative?

3. How would you have changed each job to make it more satisfying? Would you have made it more competitive?

4. How did you feel about the competitive aspects of the job and the environment?

5. In retrospect, do you feel any differently about any of the jobs?

After you have made your list and answered the questions, think seriously about the following questions:

What do you expect to get from sharing a job-both generally and specifically?
What do you expect to give to a sharing arrangement?
Do you believe you are temperamentally suited to job sharing?
What impact will job sharing have on your personal life?

MAKING THE JOB SHARE PROPOSAL

There is no required way in which a job share arrangement must be proposed. It may be done in a letter or memorandum, it may be done verbally, or the following form may be used. Whichever method is used, some written approval, with the effective date of the arrangement should be included in the files of job share partners. This is important because the effective date of the arrangement triggers the pro-ration of benefits, which is discussed in a later section.

The form provides space to indicate the information on the partners, the positions involved, effective date, the proposed work schedule, the proposed division of duties and responsibilities and management's response. The position description, work plan and performance appraisal all should be used to complete the proposal.

PROPOSED JOB SHARING PLAN

SECTION I. GENERAL INFORMATION

Name _____
Current position title _____
Current grade/step _____

Bureau _____
Division _____
Telephone _____

Name _____
Current position title _____
Current grade/step _____

Bureau _____
Division _____
Telephone _____

SECTION II. POSITION TO BE SHARED

Position title _____
Grade _____
Bureau/Division _____
Immediate supervisor _____

Effective date of
arrangement _____

SECTION III. OUTLINE OF YOUR PROPOSED JOB SHARING SCHEDULE FOR THIS POSITION (Please complete both A & B)

A Name _____

| Time | Monday | Tuesday | Wednesday | Thursday | Friday |
|------|--------|---------|-----------|----------|--------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

B Name _____

| Time | Monday | Tuesday | Wednesday | Thursday | Friday |
|------|--------|---------|-----------|----------|--------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

SECTION IV. DESCRIPTION OF PROPOSED HANDLING OF DUTIES AND RESPONSIBILITIES

Briefly describe how the following items will be handled in your job sharing plan. (attach additional pages, if needed)

1. Division or sharing of duties and responsibilities listed in position description or work plan.
 2. Exercise of supervision
 3. Use of machinery or equipment
 4. Personal contacts
 5. Reduction of duplication of effort and error
 6. Communication between partners
 7. Communication with supervisor
 8. Development of work methods and procedures (work plan)
 9. Development of performance appraisal
 10. Other considerations pertinent to this position
-

SECTION V. APPROVAL OF PROPOSED JOB SHARING PLAN

Approved _____

Approved with revisions _____

Not approved _____

Comments _____

Signature _____

Date _____

MANAGING A JOB SHARE ARRANGEMENT

Selecting the Partners

Selection procedures for a job share arrangement should be designed to determine whether and to what degree applicants possess the knowledges, skills and abilities to perform the duties of a position. In addition, a hiring authority will have to evaluate individual applicants for compatible and complementary knowledges, skills and abilities to determine if a potentially successful team can be created.

Sometimes applicants apply as a team for a job share arrangement. This often happens when current employees request job sharing, but can happen with external applicants. Where the applicants possess compatible knowledges, skills and abilities, at approximately the same level of skill and/or experience, the hiring authority can measure these qualifications against the selection criteria and decide whether or not the creation of the team is appropriate.

Sometimes there can be a significant difference in the qualifications of the persons applying as a team or one individual applying may be very well qualified, while another only minimally qualified. If the hiring authority believes the discrepancy between qualifications is too large or it would take too much time to train the less qualified applicant, job sharing may not be an appropriate arrangement. It is up to the person making the selection to decide.

As an alternative, a training assignment may be created for the person who is minimally qualified. This should be done where it appears that within six months to one year, the skill levels of the partners will be more comparable.

A training assignment may be established with the assistance of your agency personnel officer and should be done in compliance with the Pay Plan Rules on training assignments found in Policy 3-0505, Montana Operations Manual, Volume III.

Employment Preference

When the applicants for a job share arrangement come from the ranks of current agency employees, employment preference required by the Veteran's and Handicapped Person's Employment Preference Act is not applied.

Where applicants from outside the ranks of current agency employees apply for a job sharing position, the preference must be applied where applicants are eligible for the preference. For details on how to administer employment preference, see Policy 3-0171, Montana Operations Manual, Volume III.

Managing FTE

It is important for the supervisor of a job share arrangement to remember that it is budgeted as one FTE. If the partners regularly exceed the number of hours they are scheduled to work, budget problems can result.

Where a job share partner exceeds scheduled hours in a week, the partner should be paid at the regular rate of pay up to 40 hours per week. The employee becomes eligible for overtime or compensatory time only after exceeding 40 hours in a pay status in a week.

If a job share partner or the partners are required to work additional hours in a week, the supervisor may want to reduce the employee's hours at a later time in order to avoid exceeding the budget allocated to the position.

If it becomes necessary for one of the partners to consistently exceed the number of hours regularly scheduled, the supervisor may need to pursue additional training for the other partner to shift some of the workload, may need to reevaluate the way duties are assigned to the partners, may need to review work plans to determine if some duties can be shifted to a different position or may need to reevaluate whether the duties can effectively be shared or would be better performed by one employee.

ENDING A JOB SHARE ARRANGEMENT OR REPLACING A PARTNER

A job sharing arrangement may be ended for a number of reasons. It is important for both the agency and employees to agree at the start of a job share arrangement what will happen when it ends.

Ending the Arrangement

Job sharing will be a new working situation for most employees and for a variety of reasons it may not work out. The job may not lend itself to effective sharing in actual practice or the employees may not be comfortable sharing the work.

A variety of options are available to the agency to consider when a job sharing arrangement does not work out. Three of them follow.

1. Where both partners would like to continue to work part-time, the agency can split the position into two part-time positions. The partners would no longer share the work, but would only be responsible for the duties of a part-time position. Currently, the agency would be required to begin paying the full share of the group insurance benefit to both employees, instead of pro-rating the benefits, if they both work 20 hours per week. This is explained more fully in the section on group benefits.
2. Where FTE is available, one partner could be moved to a different FTE. The remaining partner could either assume the full-time duties of the position or another job share partner could be recruited.
3. The third major option is to lay-off one of the partners and have the remaining partner assume full-time responsibility for the duties of the position. This means ending sharing of the position and returning it to a full-time position for a single employee.

The Reduction In Force Policy (3-0155, Montana Operations Manual, Volume III), is used to determine which employee to retain. The policy requires consideration of skill and length of continuous service in the agency in making the lay-off decision. Skill is considered first and the primary factor used to determine skill level is "qualifications and experience to perform duties of a specific position which will be retained." Managers should read the full policy and consult with the agency personnel officer regarding implementation of the policy.

If the partner you want to retain does not agree to accept full-time employment, that partner should be laid off. Full-time employment could then be offered to the partner originally selected for lay-off. If that partner has most, but not all, the qualifications to perform the major duties of the position, the agency may want to consider a training assignment for the employee.

A training assignment also is an option where the partner originally selected for lay-off is minimally qualified. However, in this situation, the agency may want to lay off both partners and consider all persons in a reduction-in-force pool, which would include the remaining partner, for the full-time position. The agency may want to open recruitment for the position internally or externally.

Replacing a Partner

Where one of the partners leaves the job share arrangement, again, the remaining partner could assume full-time responsibility for the position or a new partner could be recruited. During the recruitment and selection period, the agency may want to require the remaining partner to assume full-time duties until a replacement partner is chosen. The remaining job share partner should be an active participant in the selection of a new partner. Without the remaining partner's involvement in the design of the selection procedure and the interview and evaluation process, a compatible partner may not be selected.

Coverage During an Extended Leave of Absence

The agency and job share partners should also discuss coverage of the position if one of the partners takes an extended leave of absence. The remaining partner may not need to assume full-time responsibility while the other partner takes a brief vacation, but this may be necessary if the absence is extended. The remaining partner should expect to assume full-time duties or at least increase hours to cover the absent partner's duties.

BENEFITS

Section 2-18-107, MCA, provides that all benefits, including the state's contribution to group insurance, be pro-rated between job share partners.

Leave and Holidays

Annual leave, sick leave and holiday pay all should be administered according to provisions for employees working less than 40 hours per week found in the specific policies on these benefits. Sick and annual leave are accrued on the basis of the number of hours actually worked. Holidays are paid based on an average of the hours an employee is regularly scheduled to work. See Montana Operations Manual, Volume III policies 3-0305, Annual Vacation Leave; 3-0310, Sick Leave, and 3-0325, Holidays and Holiday Pay for details or contact your agency personnel officer.

Group Insurance

Job sharing arrangements are the only working arrangements for which the state's group insurance contribution is shared. It is to be pro-rated between the partners on the basis of the hours worked. For details on the actual contribution made per employee, contact your agency payroll clerk or the Employee Benefits Bureau, Personnel Division, 444-3871, for details.

Job sharing differs from permanent, part-time employment for insurance contribution purposes and a part-time employee may not be converted to job share status unless the employee agrees. Permanent part-time employees who work at least 20 hours per week receive the full state insurance contribution. Part-time employees working less than 20 hours per week receive nothing.

CONCLUSION

The success of a job sharing arrangement both for an agency and for the employees involved depends on whether the job itself is appropriate to share and whether two compatible employees with complementary skills fill the position.

By using the tools in this job sharing guide, agencies and employees should have a better idea about whether job sharing is for them.

For additional information on job sharing or assistance in completing a proposal, contact your agency personnel officer or the Personnel Division, Department of Administration.

